

## Sales Force Automation with Microsoft Dynamics

### Drive sales productivity, user adoption and consistent best practices with Microsoft Dynamics CRM for Sales

Streamline and automate your sales processes and enable sales people to create a single view of the customer to help ensure a shorter sales cycle, higher close rates, and improved customer retention. Microsoft Dynamics CRM business software gives sales professionals fast access to useful data online or offline so they can work efficiently and spend more time selling.

#### Microsoft Dynamics CRM for Sales



*The functionality outlined in the above diagram showcases the Microsoft Dynamics CRM capabilities that help organizations effectively manage their sales lifecycle and improve close rates.*

**“It’s given our advisors a daily discipline for pursuing leads and more time for personal relationships with people. We can identify our best sales people and regiment their best practices.”**

SHARIE ROBERTS  
Membership  
Manager,  
Equinox

**“One of the things that really attracted us to Microsoft Dynamics CRM is that, combined with Microsoft Outlook, it’s just like one product. In anything else, you’d be duplicating efforts in two separate products.”**

KAREN PLAYFAIR  
Director of Finance,  
Tourism Whistler

## Manage Work More Easily

Offer customer relationship management (CRM) functionality as a natural extension of Microsoft Outlook messaging and collaboration client. Manage customer e-mail, appointments, tasks, and contacts from a single business application.

## Understand Your Customers Better

Create a centralized, customizable view of your customer’s preferences, relationships, and activity history to better understand and meet their needs.

## Improve Sales Qualification

Spend time with the right leads and prospects. Establish consistent follow-up processes and automate sales activities with powerful system workflow.

## Increase Sales Success

Shorten the sales cycle and improve win rates with lead and opportunity management, automated lead routing, sales process management, and competitor tracking.

## Keep Customers Informed

Use simple, wizard-driven sales and marketing features to keep your sales prospects and customers informed of new product and service offerings.

## Analyze Sales Performance

Use flexible reporting to forecast sales, measure business activity and performance, track sales and service success, and identify trends, problems, and opportunities.

## Drive Successful Customer Interactions

**Work in a familiar user interface:** Manage and monitor all your interactions within a single business application. Automatically synchronize Microsoft Outlook e-mail, calendar, tasks, and contacts with your Microsoft Dynamics CRM database. Automatically convert e-mail messages into contacts, leads, and opportunities.

**Target your communications:** Use customizable templates to create and send e-mail messages to targeted prospects and customers. Quickly create and send communications using Microsoft Word Mail Merge.

**Work away from the office:** Access robust functionality offline or work from virtually any location using the Web client or a wide variety of Pocket PC devices with Microsoft Windows Mobile software. Update records, study customer data, carry out analysis, and print quotes even when working offline.

**Improve data quality:** Automatically detect and remove duplicate records to ensure the quality of your customer data.

**Do business globally:** Compete effectively for global deals and track sales information in multiple languages, currencies, and time zones seamlessly.

## Gain a Comprehensive View of Sales Data

**Gain a complete view of the customer:** View and manage account activity and history, including contact information, attributes, meeting notes, attachments, communications, open proposals, and purchased products.

**Find information quickly:** Use Advanced Find and global search to instantly zero in on key nuggets of information.

**Make the right offers:** Effortlessly track all interactions, offers, orders, contracts, and relationships associated with your account so that you can offer the right product or service at the right time.

**Uncover hidden opportunities:** Intuitively track relationships between customers, partners, influencers, and suppliers so you can uncover new opportunities. Understand and leverage complex business scenarios with enhanced support for many-to-many relationships.

## Manage and Automate Sales Processes

**Improve lead handling and routing:** Easily promote qualified leads to new opportunities with a single click. Automatically deliver the right lead to the right person according to product, territory, dollar amount, or any other criteria.

**Manage quotes and orders:** Easily create quotes, convert them to orders, then track and manage them throughout their life cycle from proposals to invoices.

**Manage territories:** Create territories for salespeople, enabling them to manage

**“As the CEO of a global company, Microsoft Dynamics CRM allows me to log in to all of our remote sites to get a snapshot of what’s going on. I can get a snapshot of what any of my business units are doing, real time, any day of the week.”**

NATHAN BUZZA  
CEO,  
Commtech Wireless

and evaluate territory-based sales processes and results.

★ Active Accounts ▾

Account Name ↑	Main Phone	City	Primary Contact	Email (Primary) ↓
1st Church of the Nazarene	(783) 540-7629	Pasadena	Angelina DeCollibus	angelina.DeCollibus@...
A Sales Store	(213) 555-0136	Pasadena	Orlando Gee	OrlandoGee@examp...
A Store	(408) 555-0136	Renton	Adrian Dumitrascu	adrian.d@ignify.com
A Symmetry	(630) 840-3351	Batavia	Matt Wilhelm	mwillhelm@symmetr...
ABC Company	(509) 548-9807	Singapore	Gary Fredrick	Gary@abc.com
Active Marketing	(02) 885-0135	Makati City	Albert Goqingco	albert.g@pplic.com
Advanced Components (sample)	(405) 555-0135	Dallas	Bobbie Mansano	someone_b@examp...
Advanced Sales Components	(430) 555-0162	Santa Cruz	Darrius Stasevicius	DarriusStasevicius@...
Affordable Equipment (sample)	(405) 555-0162	Santa Cruz	Gina Galang	gina_galang@examp...
Affordable Sports Equipment	(731) 555-0174	Lynnwood	Paul Alcorn	PaulAlcorn@examp...
Air Asia X	(603) 217-1933		Azran-Osman Rani	azran-osman.rani@a...

Accounts by Industry ▾



Industry	Count
Airline Sales a...	10
Wholesale	10
Utility Creatio...	1
Specialty Realt...	7
Social Services	1
Service Retail	1
Non-Durable Mer...	1
Legal Services	21
Insurance	9
Equipment Renta...	2
Entertainment R...	37
Eating and Drin...	2
Doctor's Office...	29
Distributors, D...	1
Consumer Servic...	21

*Take a holistic and coordinated approach to the management of customers.*

**Manage sales and marketing lists:** Import purchased lists to fuel your sales efforts. Measure effectiveness and maintain lists for annual sales campaigns.

**Manage contracts:** Easily add, edit, and track contracts associated with individuals or companies, including maintenance contracts and renewal notifications.

**Ensure sales methodology relevance:** Initiate, track, and close sales consistently and efficiently with workflow rules that automate sales stages, lead routing, notifications and escalations. Empower salespeople to create their own workflows with workflow tools designed for end users.

## Communicate Information Effectively

**Create campaigns quickly:** Use wizard-driven tools to keep your customers informed and aware of your new products and services.

**Track competitors:** Maintain detailed information on competitors associated with opportunities. Track competitor activity by product, region, or other criteria.

**Keep a product catalog:** Work with a full-featured product catalog that includes support for complex pricing levels, units of measure, discounts, and pricing options.

**Manage sales literature:** Create, manage, and distribute a searchable library of sales and marketing materials, including brochures, white papers, and competitor information.

“We’ve embarked on building a world-class sales organization, and we couldn’t have done it without a world-class sales force automation tool. Microsoft Dynamics CRM is playing a central role in achieving this goal.”

JAY DEVERS  
Director of Technology Solutions,  
Best Buy

Dashboard: Executive Dashboard ▾

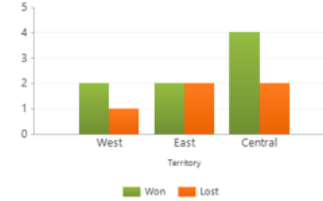
Opportunity Won Vs. Lost by Segment

Opportunities Won Vs. Lost by Segment



Opportunity Won Vs. Lost by Territory

Opportunities Won Vs. Lost by Territory



Sales Pipeline

Open Opportunities



Active Accounts ▾

Search for records

Company Name ↑	Main Phone	Address 1: City	Address 1: State...	Industry
99Cents Only Stores	1.323.980.814...	Commerce	CA	Specialty Realty
Aecom	1.213.593.8000	Los Angeles	CA	Specialty Realty
Aecom - HSMM	1.540.857.3100	Los Angeles	CA	Consumer Services
AeroVironment, Inc.	1.626.357.9983	Monrovia	CA	Consumer Services
Allergan	1.714.246.4500	Irvine	CA	Financial
AlliHthC - ABCM	1.641.456.5636	Hampton	IA	Financial
Ameripro - E-ARC Inspection Corp	1.818.500.0225	Glendale	CA	Consumer Services

Track the sales pipeline, conversion rates and much more in one unified screen.

## Transform Information into Sales Intelligence

**Generate and use reports:** Create, view and sort a wide range of reports to identify trends, measure and forecast sales activity, track sales processes, and evaluate sales performance. Easily share reports with co-workers.

**Make data relevant:** Create insightful and focused dashboards for executives and top constituents that adeptly highlight key sales metrics and performance indicators.

**Track pipelines:** Execute complex pipeline queries easily so you can gain insight into leads and opportunities at every stage of the sales cycle.

Winner of the Worldwide Microsoft Partner Award in 2014, 2013, 2012, 2011, and 2010, Ignify is a global leader in customer relationship management solutions. For more information, email [CRM@ignify.com](mailto:CRM@ignify.com), call Ignify at +1 (888) IGNIFY5, or visit [www.ignify.com](http://www.ignify.com).

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